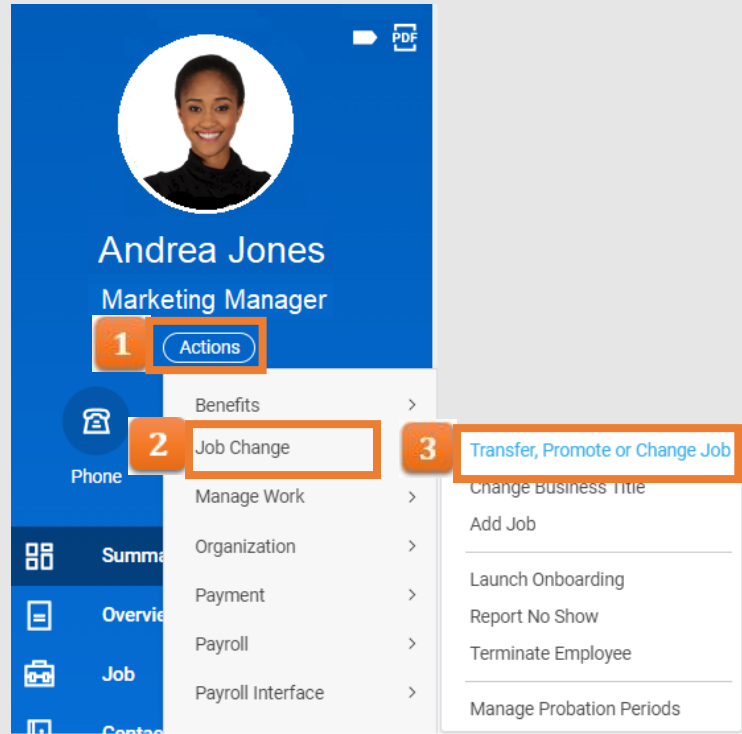


## Initiating a Transfer

The current manager is responsible for transferring the employee into a new department.

- From the employee's profile click the **Actions** button, followed by **Job Change**, and then **Transfer, Promote, or Change Job**.



- 
- 

Why are you making this change? \*

- Search
- Data Changes >
- Demotion >
- Lateral Move >
- Promotion >
- Transfer >**

Why are you making this change? \*

- Search
- ← Transfer
- Move to another Manager**
- Transfer

### Start

#### Start Details

When do you want this change to take effect? \*

03/01/2024

Why are you making this change? \*

× Move to another Manager

Who will be the manager after this change?

× Kathleen Wu

Which team will this person be on after this change?

× Kathleen Wu (Marketing Department)

Where will this person be located after this change? \*

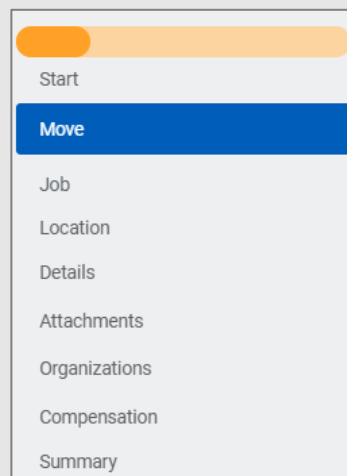
× Salem Campus

Do you want to use the next pay period?

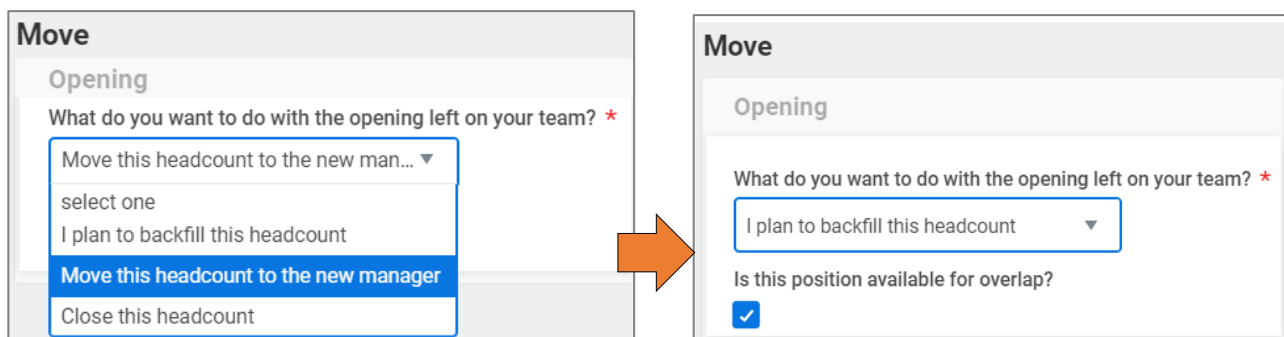
In the Start form that results, click in the **“Why are you making this change?”** field. Select Transfer followed by the reason for the transfer.

Modify the other fields as needed, then click the **Start** button when done.

3. You will be led to a sequence of screens as shown to the right in which you can make adjustment to the employee’s job details to reflect their promotion. Click on the pencil button to make edits. After entering and/or modifying the desired information in a section, click the **Next** button to proceed.



4. On the Move screen the What do you want to do with the opening left on your team? field will default to **Move this headcount to the new manager**. If you intend to backfill the now open position click in the field and select **I plan to backfill this headcount**, then indicate whether it should be open for overlap. Being open for overlap allows a new employee to be hired and begin working in that role prior to the existing employee’s transfer out.



If you do not intend to backfill the position, select **Close this headcount**.

5. Below is a summary of the input fields in the remaining sections. The screens will pre-fill with the employee’s current information and you may change items as they apply to transfer.

**Job:** Job title and job profile information


**Location:** Portland or Salem campus location, work space office location, scheduled weekly hours, working time information.

**Details:** Employee type (faculty, staff, student, etc.), time Type (full-time, part-time), weekly hours, exempt or non-exempt status

**Attachments:** A completed and signed letter for the promotion must be attached here.

**Organizations:** Organization defaults to Willamette University, adjust cost center if needed.

**Compensation:** Employee visibility date (date the salary change can be seen by the employee) and total base pay (annual salary). Other information is auto-filled, contact HR if you believe anything else needs to be changed for guidance.

6. In the final Summary section, you will review all the information from the entirety of the form and make any adjustments at needed. If all is accurate, click the  button.

7. Once submitted, the receiving manager will receive a task to determine the employee's new title, compensation, and other job details.

**You have submitted**

Up Next: J.R. Tarabocchia | Review: Receiving Manager | Due Date 01/16/2024

[View Details](#)

## Confirming a Transfer

Once the current supervisor transfers the employee, the receiving manager will review the details, make any needed changes, and accept the transfer.

1. Click on the task in your Workday inbox related to the transfer.

**Awaiting Your Action**



Transfer: **Andrea Jones**

Inbox - 1 minute(s) ago

**DUE 01/16/2024**

[Go to All Inbox Items \(1\)](#)

2. You will be led to a screen containing all the details entered by the sending supervisor. (Partial excerpt shown here.) Review all the information carefully and making any necessary changes.

**Review: Receiving Manager** [Transfer: Andrea Jones](#)

6 minute(s) ago - Due 01/16/2024; Effective 01/15/2024

**Start**

**Start Details**

When do you want this change to take effect? \*

- 01/15/2024 added

Why are you making this change? \*

- Move to another Manager added

Who will be the manager after this change?

3. Once you have reviewed the transfer information and made any changes needed, click the **Approve** button to finalize the transfer. If there are details that need to be changes that you cannot make because the sending supervisor is responsible for making the changes, you can send it back. The sending supervisor would make the changes needed, and the information will be sent back to you for review and approval.



